

Case Name: \_\_\_\_\_ Case Number: \_\_\_\_-CV-\_\_\_\_\_(\_\_\_\_) (TAM)

| <b>CASE MANAGEMENT WORKSHEET</b>   |                                  |                             |     |
|--|----------------------------------|-----------------------------|-----|
| <u>Preparation for Initial Conference</u>  |                                  |                             |     |
| Rule 26(f) conference held?  | Date:                            |                             |     |
| Deadline for Rule 26(a) initial disclosures and any HIPAA-compliant records authorizations:  |                                  |                             |     |
| Procedures discussed for producing Electronically Stored Information (ESI)?  | Yes <input type="checkbox"/>     | No <input type="checkbox"/> | N/A |
| Confidentiality Order to be submitted for Court approval?  | Yes <input type="checkbox"/>     | No <input type="checkbox"/> | N/A |
| Anticipated number of depositions:   | Plaintiff(s): 3<br>Defendant(s): |                             |     |
| First requests for production of documents and for interrogatories due by:   |                                  |                             |     |
| <u>Proposed Deadlines for Pre-Settlement Discovery (Phase I)</u>   |                                  |                             |     |
| Agreed upon completion date for Phase I Discovery:<br>(Reciprocal agreed upon document production and other discovery necessary for a reasoned consideration of settlement. Presumptively 60 days after Initial Conference.) |                                  |                             |     |
| Date for pre-settlement status conference with counsel:<br>(Proposed date to report the parties' preparedness for mediation or a settlement conference. Presumptively 10-15 days after the completion of Phase I Discovery.) |                                  |                             |     |
| <u>Proposed Deadlines for Discovery and Motion Practice (Phase II)</u>   |                                  |                             |     |
| Deadline to join new parties or amend pleadings as of right:<br>(Presumptively 15 days after initial settlement conference)  |                                  |                             |     |
| All fact discovery completed by:<br>(Presumptively 3.5 months after first requests for documents/interrogatories)  |                                  |                             |     |
| Joint status report certifying close of fact discovery:  |                                  |                             |     |
| Anticipated number of expert reports:  | Plaintiff(s):<br>Defendant(s):   |                             |     |

|   |                              |                             |
|---|------------------------------|-----------------------------|
| <b>Exchange of expert disclosures completed by:</b><br>(Presumptively 30 days after fact discovery)   |                              |                             |
| <b>Expert depositions completed by:</b><br>(Presumptively 30 days after initial expert disclosures)   |                              |                             |
| <b>Exchange of rebuttal expert reports by:</b><br>(Presumptively 30–45 days after initial expert disclosures)   |                              |                             |
| <b>All expert discovery completed by:</b>   |                              |                             |
| <b>CERTIFICATION OF THE COMPLETION OF ALL DISCOVERY BY:</b><br>(Presumptively 9 months after Initial Conference)  |                              |                             |
| <b>Final date to take first step in dispositive motion practice:</b><br>(Parties are directed to consult the District Judge’s Individual Rules regarding such motion practice. Presumptively 30 days after completion of all discovery.)  |                              |                             |
| <b>Do the parties wish to be referred to EDNY’s mediation program pursuant to Local Rule 83.8?</b>  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| <b>Do the parties consent to trial before a Magistrate Judge pursuant to 28 U.S.C. § 636(c)?</b><br>(The fillable consent form may be found at <a href="https://www.uscourts.gov/forms/civil-forms/notice-consent-and-reference-civil-action-magistrate-judge">https://www.uscourts.gov/forms/civil-forms/notice-consent-and-reference-civil-action-magistrate-judge</a> . Consenting does not affect a party’s right to a jury trial.) | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

SO ORDERED:

\_\_\_\_\_  
**TARYN A. MERKL**  
United States Magistrate Judge

\_\_\_\_\_  
**DATE**